COGNOS® 8 Business Intelligence

NEW FEATURES

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Product Information

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Introduction

This document gives you an organized view of the new features of Cognos 8 Business Intelligence. For information about changed features, see the specific product user guide.

Audience

This guide is for information technology administrators, data modelers, report authors, users of Cognos 8 Business Intelligence, and anyone considering Cognos 8.3. To use this guide effectively, you should be familiar with one or more of the following items, depending on your role in your organization:

- Cognos 8 and its components
- the existing server environment and security infrastructure in your organization
- your company's business requirements
- your company's business intelligence environment
- database and data warehouse concepts
- security concepts

Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

Note: A Web page such as **The page cannot be found** may appear when clicking individual links in the following table. Documents are made available for your particular installation and translation configuration. If a link is unavailable, you can access the document on the Cognos Global Customer Services Web site (http://support.cognos.com). Logon credentials are available either from your administrator or by request from support.america@cognos.com.

Document	Description
Cognos Connection User Guide	Using Cognos Connection to publish, find, manage, organize, and view Cognos content, such as scorecards, reports, analyses, and agents
Cognos 8 Administration and Security Guide	Managing servers, security, reports, and portal services; setting up Cognos samples; troubleshooting; and customizing Cognos 8
Report Studio Professional Authoring User Guide	Authoring reports that analyze corporate data according to specific needs

Document	Description
Report Studio Express Authoring User Guide	Authoring financial reports that analyze corporate data according to specific needs
Event Studio User Guide	Creating and managing agents that monitor data and perform tasks when the data meets predefined thresholds
Cognos 8 Architecture and Deployment Guide	Understanding the Cognos 8 architecture, developing installation strategies, including security considerations, and optimizing performance
Analysis Studio User Guide	Exploring, analyzing, and comparing dimensional data
Framework Manager User Guide	Creating and publishing models using Framework Manager
Metric Studio User Guide	Authoring scorecard applications and monitoring the metrics within them
Query Studio User Guide	Creating self-service business intelligence reports
Map Manager Installation and User Guide	Installing and using Map Manager to import and manage maps that are used in map reports
Cognos 8 Migration Tools User Guide	Moving metadata and applications from Cognos Series 7 to Cognos 8
Cognos 8 Go! Office *User Guide*	Using Cognos 8 Go! Office to retrieve content from Cognos reporting products within Microsoft Office

Finding Information

To find the most current product documentation, including all localized documentation, access the Cognos Global Customer Services Web site (http://support.cognos.com). Click the **Documentation** link to access documentation guides. Click the **Knowledge Base** link to access all documentation, technical papers, and multimedia materials.

Product documentation is available in online help from the **Help** menu or button in Cognos products. You can also download documentation in PDF format from the Cognos Global Customer Services Web site.

You can also read PDF versions of the product readme files and installation guides directly from Cognos product CDs.

Using Quick Tours

Quick tours are short online tutorials that illustrate key features in Cognos product components. To view a quick tour, start Cognos Connection and click the **Quick Tour** link in the lower-right corner of the Welcome page.

Getting Help

For more information about using this product or for technical assistance, visit the Cognos Global Customer Services Web site (http://support.cognos.com). This site provides product information, services, user forums, and a knowledge base of documentation and multimedia materials. To create a case, contact a support person, or to provide feedback, click the **Contact Us** link. For information about education and training, click the **Training** link.

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Chapter 1: What's New in Cognos 8?

Cognos 8 Business Intelligence 8.3 was created to help you deliver more targeted information to more user communities, while making it easier to deploy and manage your Cognos 8 environment. This document will help you understand the new features delivered in 8.3 that will enable you to achieve these goals.

Targeting information

As an end user, you now have more options on how information is delivered through self-service personal alerts and enhanced dashboard interactivity. Watch rules, report alerts, and watch items have been introduced to allow you to target the information that is delivered to you. Global synchronized filters and tabbed portal pages allow information to be delivered to you in briefing-book style within a portal.

As a business user, one of the most critical elements in enabling self-sufficiency is to ensure that you have the right data, modeled in a way that makes sense for your business. Transformer, Cognos' PowerCube engine and modeling environment, has been integrated with Cognos 8 security and metadata in 8.3 so that you, as a business user with specialized domain knowledge, are able to generate cubes with targeted data that suits your needs. You can leverage reports created in Cognos 8 as metadata sources for cubes, and easily integrate external data sources such as Excel files.

If your organization uses scorecards to measure and monitor performance, you can now broaden the delivery of scorecard information with the new metric portlet types that can be leveraged in dashboards. As a metrics user, you will also find improved navigation, richer visualization of information, and advanced strategy management.

As an administrator, you will also benefit from targeted information delivered to meet your needs. You can use system monitoring with metrics, thresholds, and alerts to track system performance and enable you to respond to situations that need your attention. Cognos content can now be organized with packages in folders to help you target your BI content and better organize the user experience for the multiple applications or user communities you may be managing within a single Cognos 8 environment.

Cognos 8.3 supports Sharepoint 2003 and 2007 and provides you with the ability to save report outputs to a file system. These enhancements target the value of Cognos BI by integrating with important information delivery and archiving solutions within your organization.

For more information about targeting information, see "Targeting Information" (p. 13).

Extending to more user communities

As a business user or a user with a finance background, you can author statement-style reports with the new Report Studio Express authoring mode. Report Studio is now easier to use, and has been extended with live data to meet the reporting needs of a much broader user community. You can restrict users to this authoring mode within Report Studio and, for those who also have access to Analysis Studio, can pass context to Analysis Studio without setting up drill-through access.

As a business analyst, you will benefit from new productivity features in Analysis Studio, as well as from the ability to share sets with other analysts, extending the value of your analysis to your colleagues.

As a professional author, you will gain from many additional features that will help you customize how information is delivered to report consumers. Some of the Report Studio enhancements include horizontal pagination, no data support, and table of contents.

Go! Office has been enhanced to leverage saved report output and improve prompt management. Briefing books can be updated quickly using saved, scheduled content and multiple reports can be linked together and updated using a single prompt property.

For more information about how you can extend the value of BI to more user communities, see "Extended Reporting and Analysis" (p. 25).

Enhanced Deployment and Administration

As a system administrator, you can will have an enhanced administration experience with role-based tasks, improved queue management, job prioritization controls, and integration to enterprise management systems. The new Administration console in Cognos 8 provides a single view of your Cognos 8 enterprise environment for easy system management and visibility into past, future, and interactive requests, with information about the user, if desired. Reduce support call volume by proactively managing your BI environment with detailed metrics, thresholds, and alerts, and get visibility into issues, so that you can resolve them before they impact your business.

As a data modeler, you can make information models more robust by leveraging Cognos proven practices at design time with the Model Advisor and gain visibility to minimize the impact of changes on reports. You can also implement changes faster from design to production through improved impact analysis on reports, collaboration and merging of model changes, and flexibility to retarget models from one environment to another.

For more information about features that will help you lower your cost of ownership, and better manage your BI content, see "Enhanced Deployment and Administration" (p. 37).

Chapter 2: Targeting Information

Cognos 8 Business Intelligence features enhancements for end users, business managers, business modelers, and drill-through authors.

End Users

Cognos 8 Business Intelligence now offers more targeted information delivery for end users with the ability to subscribe to reports, manage alert lists, and set watch rules based on conditions and thresholds.

Cognos 8 also provides an enhanced consumer and dashboard experience. The Cognos Connection user interface has been updated to provide more space for reports and information that you care about, and uses less space for toolbars and functions. There is also a new corporate portal style and an updated **Welcome to Cognos 8** page.

As well, a number of key enhancements for dashboards have been added. When you review a report, you can control when you want to be notified that reports are available, and control how you can explore the information context while viewing reports.

My Watch Items

Use the **My Watch Items** area of the portal to view and manage alerts for new report versions and rules that you have set for conditional report delivery. The **My Watch Items** functionality enables end users to monitor and manage business information that is critical to them from a single location.

As a report owner, you must allow report users to receive alerts and create watch rules for the reports. For information about how to enable these features for reports, see the Report Studio Professional Authoring *User Guide*.

Report Alerts

By enabling an alert on a report, you can now be notified when a new version is available. Whenever a report is run and saved due to a scheduled or manual run, all subscribers receive an email that a new version is available.

Subscriptions are saved to the **Alerts** tab of **My Watch Items** and can be maintained from that location.

Watch Rules

A new watch rule action is available in Cognos Viewer. You can use watch rules to control when users are notified about the availability of new report versions. When a report is run and saved, a user-defined threshold condition is checked. If this condition satisfies a user's criteria, the report can be emailed.

To create a watch rule, a saved report must be viewable in HTML format. You can select the data to be monitored and enter the threshold condition that will trigger the delivery of the report. Watch rules are saved to the **Rules** tab of **My Watch Items**, and can be maintained from that location.

This feature lets users maintain their own report distribution preferences and avoid information overload.

Interactive Reports

Reports created with Cognos 8.3 can be more interactive and intuitive with new features such as navigating by a table of contents, filtering on a chart region, and enhanced prompting. For more information about how to enable these features, see the Report Studio Professional Authoring *User Guide*.

Enhanced Portal Interactivity

A number of new features have been added in Cognos 8 to enhance the experience of end users, such as additional metrics portlet types that can be set up to deliver information to you, tabbed portal pages, and global filters. As a portal user, you will also experience improved performance due to changes in the way the queries for portal content are executed.

Tabbed Portal Pages

A new portlet type has been added so that tabbed briefing-book style portal pages can be set up to serve the needs of information consumers. The multi-page portlet allows BI content to easily be displayed in multiple tabs that are easy to navigate.

Global Filters

You can select the dashboard context in the portal with one or more global filters. A global filter may be a prompt, a drill up or down action, or report that is based on drilling through content. For example, you can add a prompt control to a portal page to automatically pass the selection to all reports on the page. When a prompt answer is changed, all related reports will refresh accordingly. So, if you answer a country prompt with Brazil, all related reports on the page will be filtered to show the data for Brazil.

When these techniques are used on a tabbed dashboard, the context is passed to all corresponding sections of the dashboard. This functionality allows for a single selection to drive a number of reports at once.

For information about how to set up enhanced portal interactivity, see the Cognos 8 Administration and Security Guide.

My Activities and Schedules

You can manage Cognos 8 activities from **My Activities and Schedules** in Cognos Connection.

You can view a list of your activities that are current, past, upcoming on a specific day, or scheduled. You can filter the list so that only the entries that you want appear. A bar chart shows you an overview of activities.

You can set run priority for entries. You can also view the run history for entries, specify how long to keep run histories, and rerun failed entries.

For more information, see the Cognos Connection *User Guide*.

Drilling Through on Multiple Values

Drilling through is now more powerful and flexible. You can pass multiple items, such as products or countries, to a target report. You can now use this feature regardless of the type of drill-through path that was created. Drilling through is automatically enabled when you select multiple values.

In previous versions, passing multiple values was available only within drill-through paths created in Cognos Connection.

More Information in the Go To Page

Additional information has been added to the **Related Links** page. **Related Links**, also known as the **Go To** page, is used to show you all of the drill-through paths available from a source report. The page now automatically shows more information, such as what the target report is, and where it is stored. This information will help you choose which drill-through path to use.

Go Directly to Target Report When Only One Target Report Exists

When there is only one target report available, you can now go directly to the target report when you click the **drill-through definitions** button. If there are multiple target reports available, you see the **Go To** page. This behavior is automatic and works the same way whether the drill-through path is defined in Report Studio or in a drill-through definition from Cognos Connection.

Saving Report Outputs to a File System

You can now export report results directly to a server file system using Cognos Connection. You decide which formats to export, and select from a predefined set of directory locations. This feature makes it easy to integrate Cognos content into other external applications.

Cognos 8 does not keep a record of the exported reports, but it does prevent and resolve name conflicts that arise when the same file is saved multiple times to the same directory. You are responsible for managing the reports after export. An XML descriptor file with the same file name prefix is created, which can be used by an external application to locate and manage the exported reports.

The export options appear as run options for a report, provided you were granted access to this feature.

Business Managers

For business managers who monitor or create scorecards, Cognos 8 Business Intelligence has improved in the area of measuring and monitoring performance, specifically by increasing metrics customization and strategy management. Also, there is now greater visibility to key metrics, including new scorecard views and reports.

Additional Content in the Portal

You can add the following new portlets in Cognos Connection. The portlets show the name, status, and values of the listed metrics, and provide a link to the metric in Metric Studio.

- a scorecard

  a list of all the metrics on a scorecard

- an accountability list

  a list of all the metrics owned by the current user

- a strategy metric list

  a list of all metrics associated to a strategy

- a metric type list

  a list of all the metrics of a metric type

- a metric history chart

  a graphical chart illustrating the historical performance of a metric

More Insightful Impact Diagrams

Relationships between metrics are now easier to see. Metric Studio automatically creates impact relationship diagrams that show how the metrics on a child scorecard affect the metrics of the same type on its parent. These impact relationship diagrams help to reveal the organizational contributions hierarchy of your metric performance.

When you create metrics of the same type on a parent and child scorecard, Metric Studio automatically creates an impact diagram. To display these impact diagrams, select the metric or metric type that you want, and click the **Diagram** tab. On the impact diagram, you can switch between the **Summary impacts** view and the **Functional impacts** view.

The impact diagrams also consider the interdependencies that often exist between elements on different levels of a hierarchy. For example, the Northeast division of your company has offices in Hartford, Boston, and Buffalo. Using Metric Studio, you can easily determine the contribution of the Boston office to the performance of the Northeast Division.

Understanding How Actions Drive Performance

You can now include metric actions in your metric impact diagrams. These additions help you monitor the performance of iniatives, corrective actions, and metrics, using one presentation format.

Graphical Status Streamlining

A compound mouse-over feature allows you to view the full status of a metric simply by rolling over a metric name. This feature can be used by executives who want a full view of the links and interdependencies between different levels and areas of their business.

Derived Index Metric Types

By using the new **Metric Types** feature in Metric Studio, you can create a derived index metric for your application that can be used globally.

When many scorecards have metrics of the same metric types, you do not have to define the same derived index on every scorecard. You can define it once globally and have it created automatically on every scorecard that uses the same types. For example, you want to build 2,000 scorecards and every scorecard has one relationship in common. You can pass on a relationship automatically to all 2,000 scorecards. This action is done at the metric type level, and it saves the user significant time and effort.

You would first define the metric type as a derived index, then define the component metrics. When the component metrics exist on the same scorecard, a derived index metric is automatically created and calculated.

Multiformat User-Defined Columns

You can now create text user-defined columns for metrics. For currency metrics, you can define columns that are text, general numbers, or percentages. For example, you want to create a custom column that reflects a target percentage even though the actual data is in dollars. In the past, you would enter dollar amounts in both columns, such as $1,000,000 against $800,000. You can now express your target and actual data using different unit formats, such as 112% versus $800,000.

Reporting Improvements

The new Cognos 8 Business Intelligence release includes a number of reporting improvements.

- Creating Report Studio reports from your metrics application is now easier.
- Metric Studio includes a new report model that is optimized for more effective access to the metric store.

  This provides improved performance in most applications.
- New prepackaged reports provide more useful business reports that can be used immediately or customized for your organization.
- In addition, the reporting model is now updated to include new business information, including user-defined columns and most recent periods.

Strategy Management

Metric Studio improves your ability to organize your metrics and communicate your strategy with new strategy functionality.

New hierarchical strategy and strategic elements, which represent a company's strategy and objectives, have replaced the groups and group views of previous versions.

Business Modelers

Business users with specialized knowledge of the way they would like to see the business modeled can now leverage Transformer, Cognos' PowerCube dimensional modeling environment, and build cubes to better target the needs of different areas of the business.

Transformer is now integrated with Cognos 8 so that as a business modeler, you can leverage the security, data sources, and platforms within a Cognos 8 environment. When you use Transformer, you are no longer dependant on your Framework Manager modeler or administrator to model or publish PowerCubes to your Cognos 8 environment. Any modeler can use the security providers configured in Cognos 8 instead of needing to maintain specific security in Cognos Series 7 Access Manager for PowerCubes.

Transformer Integrated into Cognos 8

Transformer is now fully integrated into Cognos 8 Business Intelligence. This includes the ability to leverage Cognos 8 metadata, support for cube building on Cognos 8 platforms, and integration with Cognos 8 security.

Providing Cognos 8 Security in Transformer

You can now use any Cognos 8 security provider as a security source for models and cubes. Series 7 security is available as a namespace through Cognos 8, and can be maintained, but is now optional. Transformer now enables you to select the users and groups from the Cognos 8 namespace of your choice to secure the model. This feature allows the modeler more flexibility in designing the security filters for PowerCubes.

In addition, Transformer includes an enhanced user interface for building custom views directly inside the Transformer model. The model can also be scripted with MDL syntax.

Upgrading Series 7 Security in Transformer

User class views in Series 7 models will be preserved when upgraded into Cognos 8 Transformer. This functionality allows you to upgrade the views and retain the dimensional filtering you created in Series 7, such as apexing or cloaking, but move to Cognos 8 security.

As a modeler, you have a choice in how the security is handled based on your needs. You can choose to

- import only the user class views which will be converted into Transformer 8.3 custom views. This option allows you to add Cognos 8 security objects from any namespace to immediately take advantage of Cognos 8 security, while preserving the dimensional filters created in Series 7.
- import the user class views and the Series 7 user classes. This option is only possible if Series 7 Access Manager is exposed as a namespace.
- remove all views and user classes.

Framework Manager Packages as Data Sources

When creating a Transformer model, you can now use published Framework Manager packages from the content store as data sources.

This means that the PowerCube modeler has access to any relational or dimensionally modeled relational data source from which Framework Manager creates a package. You use the Framework Manager package to choose the queries that best suit your Cognos 8 Transformer model. As the Transformer modeler, you no longer need to rely on the Framework Manager modeler to publish externalized queries.

In Cognos 8 Transformer, the data source is created when the package is selected. Each package can have multiple queries associated with it. Modelers can either use the auto-design feature to design the dimensions and measures, or perform the task themselves manually, after the data source is added.

Transformer also includes support for prompts, filters, session parameters, and calculations from a published Framework Manager package. Cognos 8 packages will support multi-select statements, multi-data source connections, and local processing, which were not supported when using a Framework Manager externalized query.

Reports as Data Sources

When creating a Transformer model, you can now use reports authored in Query Studio or Report Studio against relational or dimensionally modeled relational packages as a metadata source. This functionality means that you have access to query items, calculations, filters, and prompts for list reports. You choose the query items in the report that will best suit your Cognos 8 Transformer model.

As a Transformer modeler, you no longer need to rely on the Framework Manager modeler to publish externalized queries. In Cognos 8 Transformer, you create the report data source when the report is selected and the first query is defined. You can also add queries to a Cognos 8 report data source, if desired, by using either the auto-design feature, or by manually designing the dimensions and measures, after the data source is added.

Create Dimensions from OLAP Packages

As a Transformer modeler, you can take advantage of the open data access strategy from Cognos 8, by leveraging the dimensions from other OLAP packages, such as PowerCubes, Essbase, or SAP. You can import the published metadata for a dimension from a published OLAP package to create

a new dimension in a Transformer model, provided it is not the time dimension. This functionality is available from the dimension map within Transformer.

To create a PowerCube, which is a smaller, more focused slice of another OLAP data source, you can author the fact query in a Cognos 8 report and export it to a CSV file. This CSV file can be used as the transactional data source.

Cube-building Support on Cognos 8 Platforms

You can now build PowerCubes on more platforms. The resulting PowerCube can be secured using Cognos 8 security without separately installing either Series 7 Access Manager or Content Manager on a Windows platform.

Cognos 8 Transformer provides the same level of support for all platforms as the Cognos 8 suite of products offer. Models are still designed in Transformer on the Windows platform. In LINUX and UNIX, the modeler transfers the model file to the server, and then uses a script to direct the Transformer installation to build the cube.

If you continue to use Series 7 Access Manager security, the Cognos 8 content manager will still be required on a Series 7.4 platform.

Publishing a PowerCube from Transformer

After building a PowerCube in Transformer, you can publish it directly to Cognos Connection. As the Transformer modeler, provided you have the appropriate privileges, you no longer need to rely on the Framework Manager modeler in the publishing process.

You can also publish any package to any location in the content store to which you have access. For example, you can publish a group of common PowerCube packages under a single folder for a specialized group of users. This functionality is particularly useful in environments with many different applications.

PowerCube Creation and Management

Cognos 8 Business Intelligence has seen a number of enhancements in the area of PowerCube creation and management.

You can now

- build PowerCubes on Cognos 8 supported platforms, like LINUX and HPUX Itanium, provided that IQDs or Access Manager security is not used.
- use Framework Manager published packages, Query Studio list reports, or Report Studio list reports as data sources to define your queries in Transformer.
- create a dimension leveraging the metadata from an OLAP package.
- use a CSV file exported from Cognos 8 studios in Transformer as a data source.

  This can be a scheduled Cognos 8 report that was saved to an external location accessible by the Transformer modeler.

- upgrade your Series 7 Transformer models, preserve the filters in your user class views, and immediately begin to take advantage of Cognos 8 security.
- add multiple security objects from the same namespace to a single view such as multiple users, roles, or groups from any configured Cognos 8 namespace.
- publish PowerCubes directly from Transformer to Cognos Connection from either a Windows application, UNIX, or a command line as part of a script.
- update PowerCubes using the PCConnUtility.

  This utility allows you to refresh PowerCubes in a production environment without impacting end users by disabling the data source and updating the connection string.

Cognos 8 PowerCube Connection Utility (PCConnUtility)

Cognos 8.3 now includes a new utility for updating PowerCubes published to Cognos Connection. This utility can be used in a variety of ways depending on the needs of your organization.

- After rebuilding or updating a PowerCube, you can set the connection to point to the updated cube without negatively impacting users.

  After a brief period, the old PowerCube can be removed safely or archived for backup purpose.
- If the environment only allows for a single version of the PowerCube at any time, you can use the enable and/or disable data source command in conjunction with the stop and/or start of the report service and batch service.

  This provides an immediate change in the data source and allows you to overwrite the PowerCube.

The sample cubeswap utility that was shipped in previous versions of Cognos 8 will be deprecated in a future release. For more information on this utility and it's replacement, please see the Cognos 8 Transformer *User Guide*.

Series 7 IQD Support in Cognos 8 Transformer

Cognos 8 Transformer continues to support IQD data sources, generated from either Cognos Series 7 Impromptu or Cognos 8 Framework Manager, as an externalized query file. Either of these IQD files can be used with Transformer, provided the Series 7 Gateway, which was used to execute the IQD query, is installed on the Transformer machine to test data sources or build PowerCubes. This optional component is only available for installation on supported Series 7.4 platforms.

Transformer now supports Cognos 8 data sources such as packages and reports. To leverage the Cognos 8 query engine and the benefits of local processing, multi-select statements, and multi-database connections, we recommend that you switch from an IQD data source to the Cognos 8 data sources. Framework Manager externalized queries (IQDs) can be published in a package that would allow you to get the benefits of support for local processing, multi-select statements, and multiple data source connections which were not possible with the Framework Manager IQD. Creating a Query Studio or Report Studio report, based on this now published query, can provide

your Transformer modeler with an additional level of self-sufficiency by enabling them to edit the query as needed without involving Framework Manager.

Once you have a Cognos 8 data source, which contains essentially the same query items that your Series 7 or Framework Manager IQD file had, you can change the data source type in Transformer from the IQD file to the Cognos 8 data source. You will be asked to match columns, and once completed, the upgraded model, which previously used IQD files, can now also leverage the benefits of Cognos 8 data sources.

The Framework Manager externalized query will be deprecated in a future release.

Drill-Through Author

Drilling Through on Multiple Values

Drill-through paths authored in Report Studio are now more powerful and flexible, which allow you to pass multiple items from a single query item in a report. For example, you have authored a drill-through path within your Report Studio source report on the Country query item. From Report Viewer, you can multi-select Canada, United States, and United Kingdom and then perform a drill-through action by right-clicking to view your target report.

In previous versions, passing multiple values was available only within package-based drill-through paths created in Cognos Connection.

Go Directly to Target Report When Only One Target Report Exists

When there is only one target report available, you can now go directly to the target report when you click **Related Links** from the **Go To** menu. If there are multiple target reports available, you will see the **Go To** page. This behavior is automatic and works the same way whether the drill-through path is defined in Report Studio or in a drill-through definition from Cognos Connection.

Set Prompt on Drill

New options are now available when setting up drill-through definitions in Cognos Connection or Report Studio. You can control whether an authored prompt page on a target report is always show, shown only based on the properties of the target report, or shown only when required parameters are unfulfilled.

- To always display prompt pages when the drill-through action occurs, regardless of whether values were specified for the required parameter values, click **Always**.
- To use the prompt settings of the target report (specified by the **Prompt for Values** checkbox in the **Report Properties** pane, and **Report** tab in Cognos Connection) to determine whether to show the prompt pages, click **Based on the default prompt settings of the target report**.
- To not display prompt pages when the required parameter values are provided by the drill through definition, click **Only when required parameter values are missing**.

To set these options in Report Studio, click the drill-through definitions button. In Cognos Connection, from the **Launch** menu, click **Drill-through Definitions**.

Drill-through Debug User Interface

You now have an enhanced **Go To** page which shows information about what may be passed when you use the drill-through functionality. This new capability allows you to see the values, in the context of what you have selected, that are available to be used. You can also see the values that the source intends to map to the target parameter, before performing the drill-through action.

Transformations still may occur with OLAP sources that have relational targets. However, this information can help to diagnose issues between data sources of the same type, such as relational to relational.

This feature can assist you with troubleshooting issues, such as

- unsuccessful drill-through paths
- incorrect values passed to parameters
- unexpected results
- unexpected prompting where no mapping is shown

Access to the debug user interface is a capability granted to specific users or groups by the administrator.

Chapter 3: Extended Reporting and Analysis

Cognos 8 Business Intelligence features enhancements for report authors, including simplified and interactive statement-style financial authoring in Report Studio. Cognos 8 also includes functionality for professional report authors to improve the productivity by enabling them to create more sophisticated reports and analyses. Business analysts can take advantage of new features in Analysis Studio to improve productivity and leverage set definitions across user groups. For Office users, there is more control over linking prompted reports together and using saved report output.

Express Authoring in Report Studio

Report Studio has been extended to serve the needs of users who need quick and easy report creation and formatting capabilities, without requiring professional authoring skills. Report Studio now contains the traditional Professional authoring mode, with enhancements in this release, as well as the Express authoring mode.

Users can be restricted so that they only access Report Studio in Express authoring mode and cannot move to the Professional authoring mode. Professional authors can move from one authoring mode to another using the **View** menu. When you move from one authoring mode to another only the interface changes, and the report specification remains unchanged.

You can use the Report Studio Express authoring mode for financial report authoring, such as creating and maintaining statement-style reports. Financial authoring requires many but not all of the features that already exist in Report Studio, combined with a more intuitive user experience, and interaction with live data.

The user interactions in Report Studio have been streamlined, which simplifies the process of creating statement-style reports. Only features essential to statement authoring are exposed in the Report Studio Express authoring mode.

The following features are some of the highlights added to Report Studio to support users who are not professional authors. As an Express user, you can use Windows-like toolbar buttons for styling rather than property sheets. The Report Studio Express authoring mode does not expose the query interface or property page, and the toolbox contains a simplified set of items. A template featuring an appropriate starting point for financial report creation is offered out of the box.

For more information about the product, see the Report Studio Express Authoring *User Guide*.

Intuitive Drag and Drop UI with Live Data

In the Express authoring mode, you can choose to see live data being updated dynamically on the screen while you author reports, or you can use a page design mode. An intuitive drag and drop user interface has been created to support member insertion and ordering of members. Report Studio automatically shows dashed boxes during drag-and-drop operations so that you can easily see where an object is being dropped. In addition, you can multi-select members to add them to the

crosstab and decide whether parent members are displayed before or after children on expand, or on insert with children. Report Studio now provides more options for inserting items from the data tree, including

- inserting a member
- inserting children as a set
- inserting above or below
- nesting
- double-click expand and collapse
- reordering of members

These options are ideal for financial analysts who want to quickly build up a set of accounts on the rows of their report. The options are the default behavior within the Report Studio Express authoring mode and have right-click options as required.

Styling Options

As an Express user, you use the Windows-like toolbar buttons for styling rather than using a property sheet. Many options for formatting and styling a report are available, such as data formatting and an intuitive style dropper.

Predefined Calculations

You can take advantage of predefined member calculations, such as +, -, *, /, rollup, %, and can edit these calculations with the Report Studio expression editor.

Extended Crosstab Indentation

Crosstab indentation was extended with new properties to support both outdenting and relative indenting. Relative indenting adds an indent based on the levels as they appear in the report rather than in the cube data source. You can now avoid double-indenting. In previous versions, double-indenting occurred when members were taken from both the parent and grandchild levels.

Customizable Data Tree

Data tree views are customized in Cognos 8 to better support the specific needs of the author. You can select options for a metadata view with dimensions, hierarchies, levels, and an optional members folder, or you can select a member-oriented tree view, such as the one in Analysis Studio. You can select a combination of these views.

As a Report Studio user, you can define default views suited to your own needs as well as customize the tree view using the **Tools > Options** menu.

Context Area in Report Studio

A context area that operates exactly like the one in Analysis Studio is now available in Report Studio, so that you can set the context for a given report.

With this new feature, financial analysts and professional report authors can define their report context interactively and avoid having to manually create slicers in the query.

The context area appears just above the report work area.

Note: Context can be used as a filter during authoring, or to prompt the report consumer for a dimension member or members when it is run.

Page Layers

In the **Page layers** pane, you can create uniform page sets broken by dimensional member. Using this feature, you can create multi-page reports for the children of a hierarchy, or for a selected list of dimensional members. The page heading will automatically show the name of the selected page member(s).

Enhanced Conditional Styles

Conditional styles are now easier to use, due to a new streamlined user interface in Report Studio and simple options for creating thresholds and applying conditional styles.

You can now apply multiple conditional styles in reports. For example, you can apply one style for data formats, in specific cells, and apply a second style for conditional highlighting to the overall report.

Prompting

The context defined in the context area can use prompted or static values. The use of prompted values allows for greater flexibility when distributing a report to other users.

Intersections

A new toolbox item can be used to create intersections or tuples. You can create rows or columns in a report that use specific items from multiple dimensions and optionally, a measure.

Professional Report Authors

As a professional author who requires access to the full range of Report Studio functionality, you can use the Professional authoring mode. This mode is the traditional Report Studio authoring mode and the only authoring mode available until this release. Professional authors also benefit from the features described for the Express authoring mode. All the features developed for Express authoring, with the exception of live data presentation, are available within the Professional authoring mode.

Table of Contents in Reports

You can now add one or more table of contents (TOC) items directly inside reports to summarize all or part of the content of the report. The TOC items also provide page numbers and dynamic links to the content. The TOC items can be particularly helpful in report books such a customer-facing financial statements.

You can create a report book that has an overall TOC item at the start of the document, perhaps after a title page, and a second TOC item later in the document to list appendixes.

One or more TOC items can be placed into the report layout as required. A series of TOC entry objects are then placed throughout the document to define the contents of the TOC. TOC entries can be nested to create an indented appearance.

Level numbers can be added to the TOC using a new report layout function, **TOCHeadingCount**( ), which returns the level of the current item within the TOC.

Horizontal Pagination

Reports can now span two or more page widths in a PDF. This is useful when you want wide data in lists and crosstabs to show in its original size. In previous releases, the size of the list or crosstab was scaled down when necessary to fit on a single page. This is still available if you deselect the **Allow horizontal pagination** option.

To preserve context from page to page, you can determine which list columns will repeat on every page. All crosstab rows and columns repeat on every page. List and crosstab objects have a new property for the horizontal pagination option. List columns also have a new **Repeat every page** property that indicates whether they should repeat.

Several options for horizontal page numbering are provided, including simple sequential numbering and separate vertical or horizontal page numbers. For example, you can use the numbering schemes 1-1, 1-2, 2-1, 2-2, and so on.

Two new page number functions show the horizontal page number and count. A related function converts numbers to a character sequence, show in horizontal page numbers such as 1, 2, and 3 as A, B, and C.

Report Studio also provides new functions **HorizontalPageNumber**( ), **HorizontalPageCount**( ) and **mapNumberToLetter**( ) to allow you to create your own entirely custom page numbers.

Paged Prompts

The **Select & Search** and **Value** prompts let you page through large numbers of prompt values. Prompts are shown faster, which is preferable to waiting for all values to display.

No Data Handling

You now have more flexibility in handling situations where no data is available in a report. When a query returns no data, you can choose either to provide alternate content or to remove the data frame from the report.

In the case of empty frames, a new property was added to the list, crosstab, chart, and repeater objects that allows you to enable the **No Data Contents** option. The **No Data Contents** option is a block-like frame into which other layout objects can be placed and organized. For example, a message can be generated that simply says that no data matches the search criteria.

In the case of empty pages, where an entire set of author-specified data frames contains no data, you decide on a frame-by-frame basis which frames are required. The **Render Page When Empty** property determines if the page is to be shown when the data frame is empty. For example, a financial report book for a customer has a single page with two lists, one that shows investments and one that shows market results. The market data will never be empty because there are always results to show. But if there are no investments, it is not necessary to show the page.

By setting the **Render Page When Empty** property on the investment list, you indicate that when the investment list has data the page is shown, but that the market result list is not part of the hide or show decision.

Passing Display Values to a Report on a URL

The Report Viewer URL syntax was extended so that both use and display items can be passed to a parameter. This new syntax supports all parameter types, including single value, multiple value, ranges, and so on.

The new syntax uses an XML-encoded format. While the existing syntax for passing values is still supported, you must use the new syntax for display items.

Customizable Data Tree

Data tree views are customized in Cognos 8 to better support the specific needs of the author. You can select options for a metadata view with dimensions, hierarchies, levels, and an optional members folder, or you can select a member-oriented tree view, such as the one in Analysis Studio. You can select a combination of these views.

Report Studio users can define default views suited to their own needs as well as customize the tree view using the **Tools, Options** menu.

Simplified Report Studio Style

In Report Studio, to work with classes that have minimal styling defined, use the Report Studio **Simplified** style. This option is useful when creating financial reports.

For more information about creating and modifying classes, see the Report Studio Professional Authoring *User Guide*.

Enhanced Report Expressions

A series of new functions was added in the expression editor to make report expressions more powerful. The new functions give you the flexibility to create report expressions for reporting and conditional processing. Error messages related to report expressions are now much clearer, giving you more information about the factors involved in an error.

The new functions include a new mathematical function named **mod**(), time-based functions, and conversion functions. Of interest to PowerCube users are the cube variables that can now be added to report output.

The following function can be used in data type conversions:

- number2string()

The following functions return the named PowerCube properties:

- CubeName( )
- CubeDescription( )
- CubePath( )
- CubeCreatedOn( )
- CubeDataUpdatedOn( )
- CubeSchemaUpdatedOn( )
- CubeIsOptimized( )
- CubeDefaultMeasure( )
- CubeCurrentPeriod( )
- CellValue( )

The following functions are used to determine where the current cell is within a data frame, such as a list or crosstab:

- GetColumnNumber( )
- IsFirstColumn( )
- IsLastColumn( )
- GetColumnNumber( )
- GetRowNumber( )
- IsColumnNodeMember( )
- IsRowNodeMember( )
- IsInnerMostColumnNodeMember( )
- IsOuterMostColumnNodeMember( )
- IsInnerMostRowNodeMember( )
- IsOuterMostRowNodeMember( )
- IsLastInnerMostColumnNodeMember( )
- IsLastInnerMostRowNodeMember( )

- IsFirstColumn( )
- IsLastColumn( )
- IsFirstRow( )
- IsLastRow( )
- GetTableRowNumber( )
- GetTableColumnNumber( )
- InScope( )

Singleton Results in Layout

Because singletons can now be authored in a report, you can avoid future upgrade and performance issues. Singletons are very common in real world reports.

You can insert a single data item anywhere in your report using the singleton object. The singleton object retrieves only the first row value for that query. Inserting a single data item is useful when you want to show a value that is independent from the rest of the values in the report or when you want to insert some boilerplate text, such as a company name and address. For example, you can add the total revenue value in the header of each page in a report.

You can associate multiple singleton objects to a single query to optimize performance, such as when all the data items in the singleton are from the same database table. In addition, two or more singletons can reference data items from the same query. This is useful when using a single query is more efficient to display a set of single values than using multiple queries.

You can also filter the data item in the singleton. For example, you can show the total revenue for only the year 2007

For more information, see the Report Studio Professional Authoring *User Guide*.

Page-by-Page PDF Page Layout

You can now set the page orientation, either portrait or landscape, and paper size independently on each page of PDF reports. This is useful when some pages within the same report present radically different information that is better suited to a different layout. For example, a page with a chart or table may be more suited to a landscape layout whereas straight text generally works best in portrait layout.

The page orientation and size are set as properties of the page.

PDF Enhancements

PDF configuration options for font embedding and compression have been moved to Cognos Configuration. PDFs will now use WinANSI where possible to avoid the cost of converting to Unicode.

Creating New Map Layers from Existing Map Layers

Using Cognos Map Manager, in a map that contains region layers, you can now create new region layers from existing ones. Each new region within the new layer is made up of one or more complete regions from the existing region layer.

As the report author, you can use this new feature to customize maps when the regions in the supplied maps do not correspond to the way information is managed and reported on. For example, your Sales Territories may not match the States layer. You can create a Sales Region Layer with a region such as Northwest, which includes Washington, Oregon, and Idaho. As a result, you avoid having to create a new map layer in MapInfo, a task requiring additional knowledge as well as licensing of the original MapInfo data.

It is not, however, possible to use portions of one region to form a new region. For example, you can combine the state regions of Washington, Oregon, and Idaho to form a sales region, but you cannot use portions of any region, such as cities, to form a new region.

Use Cognos Map Manager to load an existing Cognos map file, define the new region layer, and then save the map with the new layer. This map file can be used in Report Studio.

Zooming on Chart Region

You can zoom into any one area of a report. Because the area of interest is expanded to fit the full report frame, it is no longer necessary for you to create a separate map in MapInfo for each area of interest or the corresponding drill-through and report definitions.

A single map with multiple layers can be used as the target of authored reports that use a drill-through target or a prompt to define the area of interest. This functionality is accomplished using a new map property that indicates that the map should be expanded to focus on the filtered features.

For example, a single map of Europe can first show revenue by country and then, by drilling on a country, expand the selected country to fit the report frame.

Default Measure for Map and Point Charts

A default measure property was added to the map and point charts. This property makes reporting faster and easier because some report techniques depend on the use of a default measure.

Better Control of Interactive Features in Reports

You can now disable interactive features in addition to drill-up, drill-down, and package drill report options. Administrators can control access to all interactive features, including drill-up and drill-down, package drill, authored drill, Go! Search, and notifications.

This feature gives you more control of interactive activities. Hiding these functions may reduce the need for user training in large deployments.

The new capabilities are exposed as run options in Cognos Connection.

Saving Report Outputs to a File System

You can now export report results directly to a server file system using Cognos Connection. You decide which formats to export, and select from a predefined set of directory locations. This feature makes it easy to integrate Cognos content into other external applications.

Cognos 8 does not keep a record of the exported reports, but it does prevent and resolve name conflicts that arise when the same file is saved multiple times to the same directory. You are responsible for managing the reports after export. An XML descriptor file with the same file name prefix is created, which can be used by an external application to locate and manage the exported reports.

The export options appear as run options for a report, provided you were granted access to this feature.

Business Analysts

As a business analyst, you can take advantage of new features in Analysis Studio to improve productivity and leverage set definitions across user groups.

Design Mode for Analysis Studio

In Analysis Studio, you can create crosstab set definitions without running a full query after each action. This provides you with a faster way to create your analyses and validate against the data only when needed.

To invoke the design mode, from the **Settings** menu, click **Get Data Later**. Items are visible on the crosstab as users manipulate different sets of members, but data is not retrieved until you select **Get Data** from the crosstab.

Sharable Sets

You can share sets among groups of Analysis Studio users to save time and collaborate on a shared view of the business.

To use sets that other users created, in the **Analysis Items** pane, open the **Other Analysis** folder, and go to a saved analysis. The items in this folder are filtered for the package that the other user opened in Analysis Studio. To use a set from another analysis, drag it to the crosstab.

Editing Calculations

You can now edit calculations in Analysis Studio. This can simplify the process of analysis when you create calculations that reference other calculations and you want to make a change. Instead of having to go back, delete, and recreate the various component calculations, you simply modify your calculation.

To edit a calculation, select the calculation and click **Edit**.

Extended Multi-measure Analysis

You can now nest measures on the outside of the crosstab axis. For example, you can set up a nested crosstab with Revenue and Gross Margin on the outside, view the top three products by Revenue, and directly under, find the top three products by Gross Margin. This feature makes it easy to make comparisons.

To access this feature, from the **Insertable Objects** pane, select the measures you want, and drag them to the outside of the crosstab axis.

Cube Updated Date Information

You can now identify the freshness of the data in your report. In the **Information** pane of Analysis Studio, other information about the cube is visible. The **Cube updated** date variable can be inserted in the header of the report output from Analysis Studio.

To add the variable to the report output, create an analysis, and, from the **Run** menu, click **Report Options**, and select the **Cube updated date in header** check box.

More Formatting Capabilities

You can now apply formatting templates to the output of your saved analyses to apply a corporate style for the analyses created by certain users, groups, or roles. The templates, created by a Report Studio author, can include custom titles, headers, and footers.

To add formatting, create an analysis, and then, from the **Run** menu, click **Report Options**. Browse to the formatting template that you want to apply when the report is run in Cognos Viewer.

Override Special Characters

You can modify how special characters such as nulls, division by zero, and overflows, appear in Analysis Studio. You can create your own formats to replace these characters so that the analysis process is easier.

To change the display, from the **Settings** menu, click **Data Format**, and change the properties that you want.

Cognos Go! Office

Cognos 8 Go! Office features a number of exciting improvements to help you manage your Microsoft Office documents and extend the value of Cognos 8 Business Intelligence.

Enhanced Prompting in Cognos 8 Go! Office

Prompting in Go! Office has been enhanced giving you more flexibility to link multiple reports together in an Office document. Go! Office prompting now gives you several ways of entering a prompt value once and using that value in several imported reports.

In previous versions, you could use the values of an Excel cell to set the prompt values of one or more reports imported into Excel.

Cognos Go! Office 8.3 now adds the ability to set the values of report prompts with Microsoft Office custom properties. This capability is available not only in Excel, but also in PowerPoint and Word. You can set and change these custom properties or Go! Office can prompt once and store that value in a custom property to be used by all subsequent reports. This feature greatly simplifies the creation of briefing books or presentations that combine many prompted reports, and allows you to refresh these documents without answering the same prompt multiple times.

Improved Report Layout and Rendering

Cognos 8 Go! Office can now render more reports, similar to what you can do with Cognos Viewer. Rendering is also improved for positioning and layout. For example, reports shown as a two-by-three matrix of charts in a dashboard format in Cognos 8 can be rendered in Cognos Go! Office in a similar layout, rather than as a stacked column of six charts.

Support for Drill-through Paths

Cognos Go! Office now supports authored drill-through paths. This means that the same drill-through path available in Cognos Viewer can now be rendered in Cognos Go! Office. The drill-through paths appear as URL hyperlinks in the relevant Office component. When a path is selected, the default browser opens to render the drill-through object, with the security parameters also passed.

Content Portal Search in Cognos 8 Go! Office

You can now search for keywords in Content Manager from Cognos Go! Office to find reports for import. This creates common search functionality across the two interfaces.

In Cognos Go! Office, from the **Content** menu, specify your search criteria, and then select from the list which item you want to import into Cognos Go! Office.

Importing Stored and Burst Report Versions

With Cognos Go! Office, you can now import stored versions of reports into Microsoft Word, Excel, and PowerPoint. You select a version of a report previously run instead of running the report again, with a burst key used to specify sheet and workbook options. This alternative can be particularly useful for reports that are run overnight or on other batch schedules. This import also allows users in Recipient roles to use Cognos Go! Office.

In previous versions, Cognos Go! Office ran all report content on demand.

Easier Configuration

You are no longer required to configure the custom properties of every document you want to use with Cognos Go! Office.

Importing Reports from Multiple Servers

You can now create documents that include report content from more than one server. In previous version, documents were limited to content from a single server.

Reimporting Reports

Cognos Go! Office now allows you to import additional items from a report without importing your report a second time. This feature allows you to update your Cognos Go! Office presentations, documents, and workbooks when new report elements become available, or to bring in items that were previously overlooked.

Chapter 4: Enhanced Deployment and Administration

The new Cognos 8 Business Intelligence release provides significant new functionality to support enterprise-class BI deployments.

Publishing and Managing Packages in Non-root Folders

You can now publish packages from Framework Manager into any folder in Cognos Connection. In previous versions, packages could be published and maintained only in the single root folder. These packages can also be moved from the root folder to any folder in Cognos Connection. In Framework Manager, any target folder can be used for publishing.

With these new publishing rules, packages are better aligned with user communities, making it easier for you to find the right packages.

One advantage of this new publishing option is the value that it has for organizations that host business intelligence applications or enterprises that manage multiple applications for different user communities. Packages can be organized in subfolders set up for end users or customers, ensuring complete security.

Direct Cube Access

In previous versions, you had to work with a modeler or have Framework Manager installed on a modeler's desktop to be able to add cubes to the Cognos 8 server. With the addition of direct cube access, you can add OLAP data sources directly from Cognos Connection, provided you have the appropriate capabilities and permissions.

System Administrators

System administration and security has been improved to provide better visibility into system status and more granularity of control over administrative functions.

Improved User Interface for Administrators

Administrative tasks are now located together in one central management interface, Cognos Administration, so that you do not have to go through many layers of pages to find a specific set of information.

The new interface will help you make quicker, more informed decisions, and will simplify the overall management of the Cognos environment.

Access to System Statistics

You can now view, in the new Cognos Administration console, metrics regarding the different servers, dispatchers, and services that make up the Cognos environment. These metrics provide you with insight into the status of the environment.

Snapshot of System Health

You can get a snapshot of the status of all servers, server groups, dispatchers, and services in the Cognos topology.

All system metrics are now found as part of the **System** task on the **System** tab in the Cognos Administration console. By seeing statistics in their proper context, you can make better decisions in areas such as performance, scheduling, and capacity planning.

Notification of System Issues

You can now set up notifications that can be delivered based on specific system events. Because constant monitoring of an environment is not practical, use Event Studio to create an agent to look for exceptions of system metric thresholds. When a threshold is crossed, the agent can follow a specified course of action, such as sending an email, running a report, or calling a Web service to perform a specific action.

Selective Administration Functions

Role-based administration is now possible. Instead of administration consisting of several grouped functions, more granular administrative roles can be assigned. For example, an administrator can be granted access to maintaining data sources but not to administering the security namespaces. The breaking down of administrative functions is particularly useful in large organizations where different administrators can be responsible for different areas of application administration.

Managing Queues

The new Cognos Administration console provides specific views and tools to identify the report, job, or other objects currently in the queue or being processed. These views also reveal who is running the item, regardless of whether it is a background or interactive task. You can use these views and tools to better understand what is happening in your environment and take action to resolve issues. For example, by knowing who is running a job, you can cancel a job for a user.

Reducing Deployment Details

You can use the **deploymentOptionEnum, recordingLevel** deployment option to enable or disable deployment detail logging to the content store. By default, deployments no longer log as many deployment details in the content store as they once did. The deployment history will now contain summarized information by default. This will result in a reduction of the space used within the RDBMS, an increase in performance, and will require less maintenance.

You can learn the current status of a deployment by viewing periodic updates in the Monitoring Service.

Resubmitting Failed Jobs and Reports

Administrators can resubmit a failed job or report on behalf of another user. For example, you discover that 20 reports in a job containing 1,000 reports fail due to an invalid signon. The problem is corrected and the job is resubmitted so that only the 20 failed reports are rerun.

In previous versions, if you submitted a report and it failed, the run options associated with the report were lost. Now the report can be resubmitted without having to reset the run options.

Failed reports, jobs, and agent tasks can be resubmitted from the run history, accessed from the **Past activities** page of Cognos Administration, or accessed from the **Actions** page of the item.

Setting Priority on Schedules

You can assign a priority to a scheduled object that ranges from 1 to 5. This capability-based priority ensures that if two reports are waiting in the queue to be run, the report with the higher priority is run first. You can override and reset the priority on any schedule through Cognos Administration.

Programmatic Interface for Third-party Web Applications

Cognos portlets can now be embedded programmatically into third-party Web applications. Using a new command, you can import specific Cognos portlets into their custom HTML page or Web application. Any of your Cognos components can be embedded, including portlets, reports, and folders.

Controlled Searches

In previous versions, environments that did not use single signon used the credentials of the logged on user to run searches against the security source. Now you can configure an account that runs all searches against the underlying security provider. This functionality controls what the searches will return while reducing the amount of administrative work required in the security provider.

Control over Saving Report Outputs to a File System

You can now export report results directly to a server file system using Cognos Connection. You decide which formats to export, and select from a predefined set of directory locations. This feature makes it easy to integrate Cognos content into other external applications.

Cognos 8 does not keep a record of the exported reports, but does prevent and resolve name conflicts that arise when the same file is saved multiple times to the same directory. You are responsible for managing the reports after export. An XML descriptor file with the same file name prefix is created, which can be used by an external application to locate and manage the exported reports.

You grant access to the export feature and control which pre-defined directories users can save to. Cognos 8 automatically determines the file extension and limits the locations to those directories

predetermined in the configuration. These security measures prevent you from overwriting system files or making other mistakes.

The export options appear as run options for a report for users who were granted access to this feature.

Administering Tabbed Portal Pages

Portal pages now support two levels of tabs so that you can group multiple reports into one logical unit. You can assign custom portal pages to different users, groups, and roles within an organization so that users see only the portal pages assigned to them when they log on.

Portal page tabs reflect the contents of a folder. Each item that you can access in the folder appears as a portal page tab. If a folder or shortcut exists in the directory, the folder is presented as a first-level tab. Reports and other items appearing in the directory are shown as a second-level tab.

Because portal pages can now contain a second level, you can create a multitiered system of tabs and sub-tabs. For example, you create a first-level portal tab named Sales. When you click this tab, you can see a series of second-level tabs that contain the next level of data, such as Sales Quotas and Pipelines.

To set up tabbed portal pages, simply point to the folder that contains the reports and folders.

Email Delivery Enhancements

The size of files generated from report output can be quite large. This poses several problems when trying to email a report output as part of the report delivery method. Large report outputs can be blocked or stripped from the email messages by the mail servers.

Cognos 8 introduces the ability to compress the attachment based on the size of the report output.

The property is called **Maximum size of an uncompressed email attachment in MB**. The values you can use for this property are

0	indicates that no compression is to be done (default)
N>0	compress the attachment if the attachment size is greater than N MB
nil	always compress

You set this property in Cognos Administration.

Session parameters for Cognos Series 7 Authentication Providers

A session parameter is a variable that Framework Manager associates with a session. For example, user ID and preferred language are both session parameters. Because session parameters are key

and value pairs, you can think of each session parameter as an entry in a parameter map named Session Parameters. You use a session parameter in the same way that you use a parameter map entry, although the syntax for session parameters is slightly different.

Cognos 8 has introduced additional session parameters for the Cognos Series 7 authentication provider.

- basic signon name

  The userID that is used to log into the Series 7 namespace.

- OS signon name

  The OS signon that is used to log into the Series 7 namespace.

- DB signon name

  Database signon that is associated to a user as defined in Access Manager.

Similar to the **userclassID** session parameter in previous versions, if more than one object exists for the OS signon and DB signon session parameters, the first object in the list will be displayed.

Enabling Report Studio Authoring Modes

Report Studio now accommodates two distinct types of user:

- the professional report author
- the report author

You can use the Report Studio Express authoring mode for financial report authoring, to create and maintain statement style reports. Financial authoring requires many but not all of the features that already exist in Report Studio, combined with a more intuitive user experience and interaction with live data

One advantage to separating interfaces and capabilities for the two user groups is the simpler user interface for financial authoring. This dual design makes working in Report Studio more intuitive. Users can better focus on their core, resulting in reduced training and support costs.

In Cognos Administration, in the **Capabilities** user interface, you can restrict users to have access to only the Express authoring mode in Report Studio. A user with access to the Report Studio Professional authoring mode will be able to use the Express authoring mode, as well.

As a professional author, you can move between authoring modes using the **View** menu. When you move from one authoring mode to another only the interface changes, and the report specification remains unchanged.

Data Modelers

Enhancements in the area of data modeling in Cognos 8 Business Intelligence focus on usability improvements, better change management, and easier maintenance of models and reports including concurrent modeling support.

Remapping Objects

Object remapping makes it easier for you to make physical changes in a Framework Manager model. You can remap existing model objects to new or modified physical objects without having to synchronize the database. You can also modify or replace the physical layer of the model without disrupting end users by modifying the logical layers.

Shortcut Processing

Being able to specify the behavior of shortcuts is new to Cognos 8.

When you open a model from a previous release, the **Shortcut Processing** governor is set to **Automatic**. When **Automatic** is used, shortcuts work the same as in previous releases. For example, a shortcut that exists in the same folder as its target behaves as an alias, or independent instance. However, a shortcut existing elsewhere in the model behaves as a reference to the original. When you create a new model, the **Shortcut Processing** governor is always set to **Explicit**.

If you set the governor to **Explicit**, the shortcut behavior is taken from the **Treat As** property. If the **Shortcut Processing** governor is set to **Automatic**, it is recommended that you verify the model and, when repairing, change the governor to **Explicit**. This changes all shortcuts to the correct value from the **Treat As** property based on the rules followed by the **Automatic** setting.

Analyzing Object Dependency

The **Show Object Dependencies** is a new tool in Framework Manager that you can use to understand the full impact of potential changes in the model.

This tool is especially useful now that it is easier to make physical changes in a Framework Manager model due to the addition of object remapping.

Analyzing Publish Impact and Finding Report Dependencies

The functionality to analyze publish impact and find report dependencies was improved. The changes will help you track how changes made to the model will affect reports.

You can now identify report dependencies and analyze the impact of changes made to an unpublished model across all folders that they have access to in Content Manager. This analysis can be performed on any combination of available objects and content folders.

In addition, more information is provided, such as last updated by, last updated date, and modeler comments.

You can save the new output as XML or print it. You can also use it to create custom scripts to update existing applications when the model changes, and use it to provide an audit record of the changes made.

Verifying Models

Verify Model is a diagnostic tool in Framework Manager that evaluates the model for errors. In previous versions, the **Verify Model** output was a simple list. Improvements have been made to sort

and group messages by severity, as well as by the object on which they are reported. These changes make it easier for you to understand the nature of reported issues. You can now print and save the **Verify Model** output.

Model Branching

Multiple developers can now work on the same model at the same time, with as many shared objects as desired, by providing a workflow to replicate and merge models. This feature allows maximum flexibility and freedom from dependency limitations, while giving control over which changes will be included in the final model.

In Framework Manager, you can now branch and distribute a model for development and later collect and merge the changes made by multiple developers. Parallel development provides more flexibility as well as better access to granular detail by avoiding dependency-driven object locking.

As the merging modeler, you can use new conflict detection and resolution features to accept all changes and simply alert for conflicts.

Model Advisor

You can analyze the metadata in a model by using the **Model Advisor**. The **Model Advisor** is an automated tool in Framework Manager that applies current modeling guidelines and identifies inconsistencies and areas that you need to examine. To assist you in understanding the nature of the highlighted issue as well as some possible actions, you are also provided with links to the appropriate sections of the documentation.

The **Model Advisor** is not a replacement for a knowledgeable modeler; it provides new modelers with a tool to assist them, and more experienced modelers with a diagnostic tool.

Essbase Attributes by Dimension

As a modeler, you can choose how Essbase attributes are represented in the model and all associated packages. Attributes can be represented either as separate dimensions or as properties of other dimensions. The default selection will be to represent them as properties.

Attributes modeled as dimensions allow for grouped and consolidated views. They do not have a data type associated with them, such as numeric or date.

The option is set per model. **Note**: This feature is specific to Essbase.

Process and Event Management

Cognos 8 Business Intelligence features a number of enhancements in the area of process and event management.

Web Service Tasks Support All Common Types

In Event Studio, Web service tasks for agents now support all the common types of Web service definitions, including document literal wrapped. You can also pass all agent data to the target Web

service in a single call. For example, instead of just string, numeric, or date data types, you can pass complex data structures, arrays, enumerations, and even a data type that wraps a simple type. You no longer must call a Web service multiple times to pass multiple records.

Default Actions for Agent Items

You can now choose a default action to use when an agent item is selected in Cognos Connection, rather than automatically opening the agent in Event Studio. The new choices are

- show the most recent event list
- run the agent
- open the agent in Event Studio

The default action is defined on the **Agent** tab of the item properties in Cognos Connection.

Task-Level Filters in Agent Tasks

The tasks run by an agent can now be based on the data values of an event in addition to its status. The run decision can be further qualified by examining data values within the event. For example, for the event Order Requires Approval, new orders valued less than 1,000 can invoke the Normal Approval task, while new orders valued greater than or equal to 1,000 can invoke the Special Approval task.

In previous versions, it was necessary to run two agents to check for order values either greater than/equal to or less than 1,000. Adding the task-level filter reduces load on the target data source.

To set these new options to specify the task-level filters, from the **Actions** menu, click **Manage Task Execution Rules**.

Resubmitting Failed Agent Tasks

Failed agent tasks can now be resubmitted with their original data values. In previous versions, if a task failed, the data passed to the task was lost. Rerunning the agent may not solve this problem if the task is set to process new events only.

Failed agent tasks can be re-submitted from the run history. To access run history, in Cognos Administration, click the **Status** tab, and click **Past Activities**, or, in the agent task item, click **Actions**.

Running a Task on Agent Failure

You can add a special on-error task to an agent. This task runs if the final state of the agent is failed. The on-error task is considered separate from the agent and is not included in its run history.

An on-error task can be set to run if either the query or one of the tasks of the agent fails. The on-error task has access to the run history for the agent and therefore can be used to notify a user or administrator of the failure. This notification can include details such as the ID of the agent, the run time, and any error messages returned.

To define the on-error task, from the **Actions** menu, click **Manage Task Execution Rules**, and select the **When the agent or any of its tasks fail**.

Data Managers

Cognos 8 Business Intelligence features a number of enhancements in the area of data management.

Data Sources

You now have the ability to utilize Cognos 8 defined data sources in Data Manager.

Enhanced Unmatched Member Support

Data Manager now supports the writing back of unmatched members to the same dimension source when a dimension is used simultaneously by multiple fact builds.

Enhanced Semi-Aggregate Handling

As a data manager, you now have the ability to allow multiple rules for each measure and extend the available set of aggregate functions.

Load Control

To prevent overloading of the system, you now have the ability to restrict the execution of both fact build and dimension build nodes of a JobStream.

Enhanced Error Reporting for Relational Delivery Exceptions

You now have the ability to configure Data Manager to report both the error reason and the failed row of data when a relational delivery exception is encountered. The failed row of data can be delivered to a file or to a relational table.

Appendix A: Supported Environments

Cognos 8 Business Intelligence supports the following new environments:

Type	Item	New
Operating systems	Microsoft Vista - client and browser support	✔
	HP-UX 11i Version 3 (11.31) PA RISC	
	HP-UX 11i Version 3 (11.31) Itanium	
Data sources	Informix IDS 11	✔
	DB2 UDB z/OS version 9	
	Hyperion Essbase System 9	
	MS SQL Server 2005 via Data Direct 5.3	
	Netezza 3.1	
Browsers	Firefox version 2.0	✔
Application servers	BEA Weblogic 9.2	✔
	SAP Netweaver Application Server 2004s (32bit)	
Portals	MS Sharepoint 2003	✔
	MS Sharepoint 2007	
Other	Excel 2007 - export formats	✔
	Adobe Reader version 8.1	
	Microsoft .Net Framework version 3.0	

For more information, see the Cognos Global Customer Services Web site (http://support.cognos.com) under Product Information, Supported Environments.

Support for Microsoft SharePoint Portal 2003 and 2007

SharePoint Portals 2003 and 2007 are now supported in Cognos 8. You can use these portals with the Cognos Navigator, Search, Viewer, and Metrics Watchlist portlets.

Out-of-the-box webparts are included in the default Cognos installation. These webparts can be imported directly into SharePoint for immediate consumption.

Note: Webparts controls are a fully integrated set of controls used to create Web sites that can be modified for content, appearance, and behavior from directly within a browser.

Support for Microsoft Excel 2007

Cognos 8 supports Microsoft Excel 2007 native spreadsheets as a report format, in addition to the existing Microsoft Excel HTML formats. The Microsoft Excel 2007 XML format, also known as XLSX, provides a fast way to deliver native Excel spreadsheets to Microsoft Excel XP, Microsoft Excel 2003, and Microsoft Excel 2007.

The use of a native Microsoft Excel format means that the spreadsheets are smaller and more usable. Because the new Office Open XML format is a recognized industry standard supported by ECMA International, the new format provides the added benefit of an open, documented integration format that extends an open systems solution.

The new format appears in the run report user interface. Users of Microsoft Excel XP and Microsoft Excel 2003 must install the Microsoft Office Compatibility Pack, which provides file open and save capabilities for the new format.

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